

# GUIDE FOR TEMPLATE CREATION

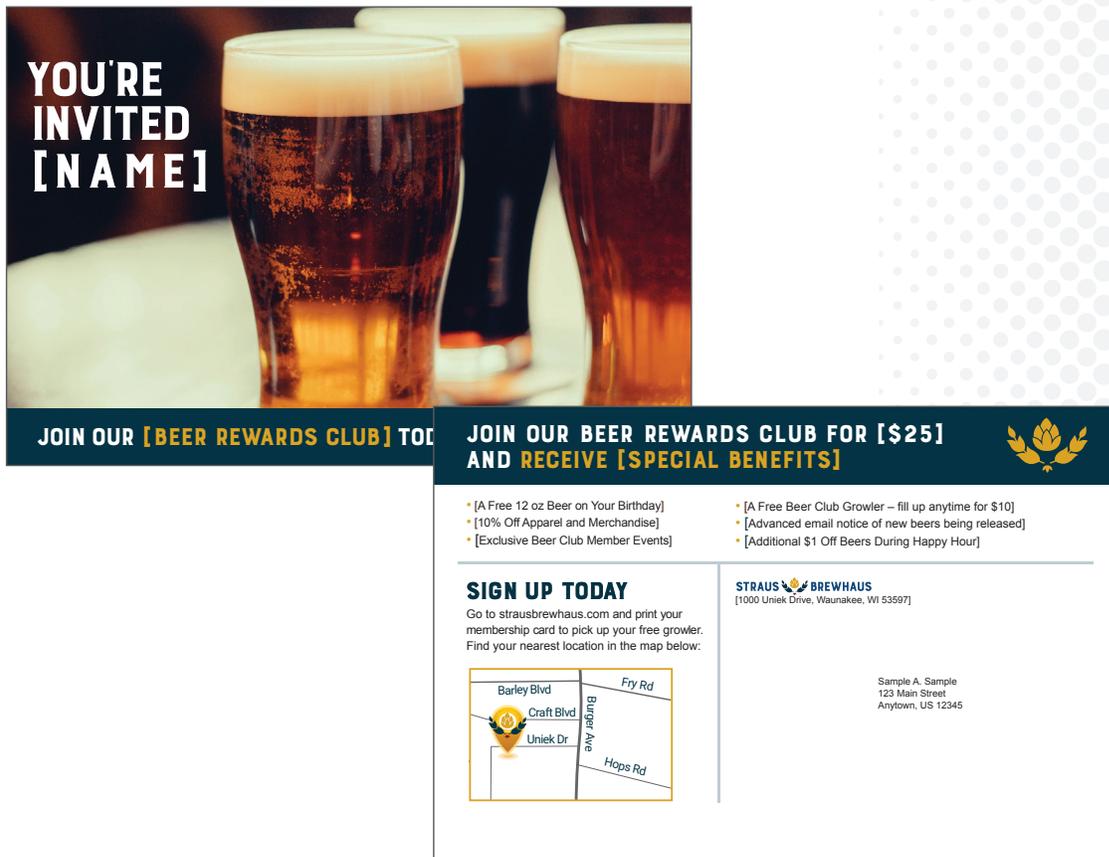
This document will assist in prepping your artwork file for template creation for eventual placement on your brand portal. **If providing a file that is not InDesign or Illustrator – although similar rules apply – the template creation process will require more time.**

The following are file setup details specific to products that allow end-users to customize via Brand Portal tools.

## Here are 6 main considerations when building artwork files for template conversion:

1. Fonts
2. Colors
3. Text Frames and Styles
4. Layers
5. Defining Customization
  - a. Variable Types & Functionality
  - b. Settings
  - c. Database
6. Packaging File for Hand-Off

For demonstration we will review best practices when setting up a basic 2-sided postcard, as shown.



## STEP 1: FONTS

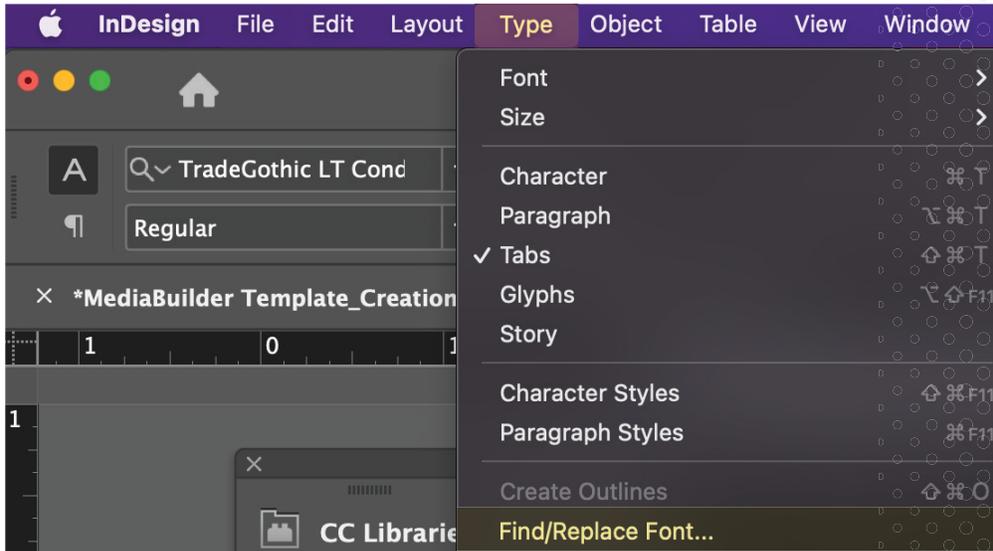
Since templates are cross-platform browser-based documents, ensure you are building with OpenType fonts.

### How to check:

1. Find the **Type Menu** at the top left of the InDesign or Illustrator window screen



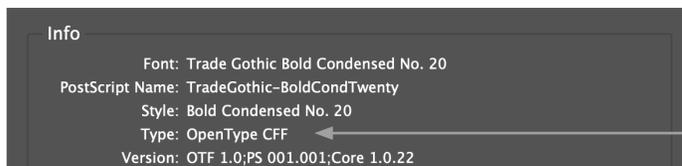
2. Click on the **"Find/Replace Font"** button within the Type Menu



3. With the font name selected, click on the **"More Info"** button in the type finder panel



Ensure font types listed are **O = OpenType**



OpenType

If non-OpenType fonts are used in background or non-customized areas, you can convert the text to outlines within the document to avoid acquiring OpenType fonts.

*Customizable font areas must remain as live text and therefore must be OpenType or TrueType.*

*If using cloud fonts, note they will not package as expected. It is still possible to collect the font for template creation: Suttle Straus will collect these fonts.*

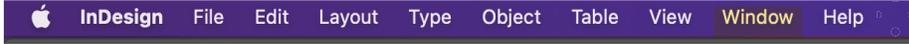


## STEP 2: COLORS

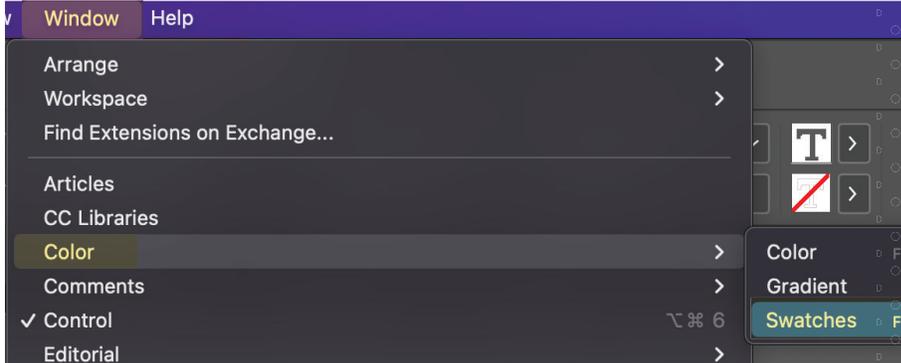
Is it 4-color? Are there spot colors? Ensure the colors of your document match how the file will print. Use the Swatches palette and/or the Ink Manager to control this. Select all unused swatches and delete.

### How to check:

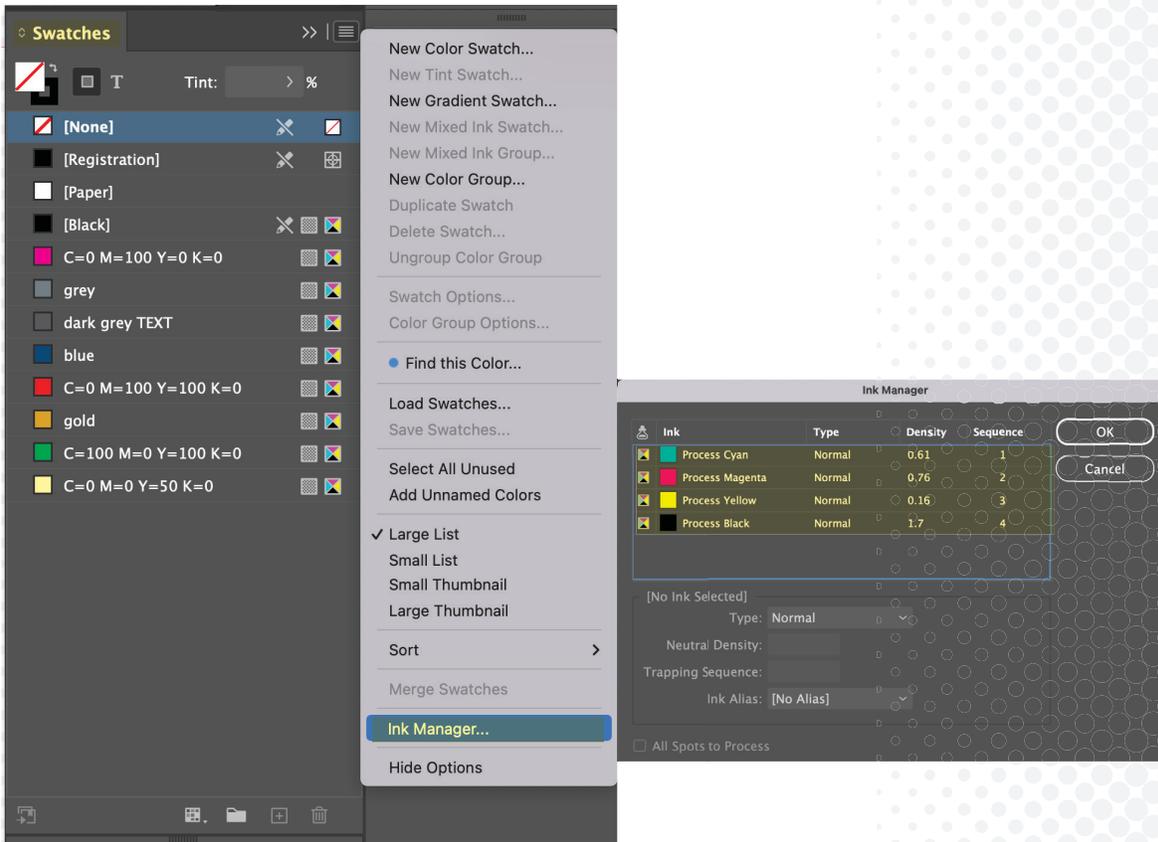
1. Find the **Window Menu** at the top left InDesign or Illustrator window screen



2. Click on the **“Color”** button within the Window Menu and select **“Swatches”**



3. In the **“Swatches”** panel ensure the color(s) of your document are set to the correct print process.



*Note: After implementation and color guidance, the provided files for template creation or updates will not be checked nor color corrected to match your brand standards guide. During setup your document will be converted to 4-color process, if necessary or if not already done.*



### STEP 3: TEXT FRAMES AND STYLES IN INDESIGN

The following are some best practices for working with text in artwork for template conversion.

When setting up customized text with different style and formats, be sure the content is created in separate text frames.

**Text Styles** - Most InDesign character and paragraph style settings will translate into template creation, however having presets can be very helpful to the creation process.

**Additionally not all styles are supported. The following are common unsupported styles:**

- Font sizes above 720 point
- Custom kerning between characters
- Gradients within customizable text (text should be solid)
- Custom text with outline and clear fill (actual outlined font must be used)
- Artificial skewing of text to create the look of italics (actual italic font must be used)
- Drop Caps
- Stacked Vertical 1-column lettering

### STEP 4: LAYERS IN INDESIGN

Within InDesign or Illustrator use brackets, layers and default text to define customizable content within the document.

Customizable text can be denoted with brackets. We do not recommend the use of default copy in variable fields - if you plan to include on the templates sample copy in a variable field, please put it inside the brackets.

Refer to example below:



## STEP 5: DEFINING CUSTOMIZATION

For all customized products, provide a PDF to visualize your final intent. Use the comments panel in Adobe Acrobat to identify the expected functionality of the document. Use as much detail as possible to clearly communicate each customizable element.

Refer to the example below:

**YOU'RE INVITED [NAME]**

**JOIN OUR [BEER REWARDS CLUB] TODAY** @ f @strausbrewhaus

**JOIN OUR BEER REWARDS CLUB FOR [\$25] AND RECEIVE [SPECIAL BENEFITS]**

- [A Free 12 oz Beer on Your Birthday]
- [10% Off Apparel and Merchandise]
- [Exclusive Beer Club Member Events]
- [A Free Beer Club Growler – fill up anytime]
- [Advanced email notice of new beers being brewed]
- [Additional \$1 Off Beers During Happy Hour]

**SIGN UP TODAY**  
Go to [strausbrewhaus.com](http://strausbrewhaus.com) and print your membership card to pick up your free growler. Find your nearest location in the map below:

**STRAUS BREWHAUS**  
[1000 Uniek Drive, Waunakee, WI 53597]

Sample A. Sample  
123 Main Street  
Anytown, US 12345

**Annotations:**

- Name field "Postcard Version" Background image changes based on version. Create a drop down list with Beer Flight, Three Beers, and Couple as options. Set the Three Beers as a default version.
- Name field "Recipient Name" The text field should shrink to fit. "You're invited" should also shrink to fit with the "Recipient Name."
- Allow for the message to be customizable. The text field should auto-fit, long lines of text should fit to a single line, without crowding the social icons. Set "Beer Rewards Club" as the default.
- Name field "Reward Offer". This field is auto-populated from Location Manager, allow text to be editable.
- Allow for the message to be customizable. The text field should auto-fit, long lines of text should fit to a single line. Set "Special Benefits" as the default.
- Each Bullet Point is an item on a drop down list. There should be a total of 6 drop down lists. The drop downs also include a selection for other, with the option for the user to enter the text. The user gets the option to choose the number of Bullet Point offers they want to list. At minimum they will get 2 bullets points. The bullet points should read across. Example: Bullet 2 is in the second column across from Bullet 1
- The Return address at the top of the mailing panel is auto-populated from Location Manager. (Street Address, Suite/Unit Address, City, State, Zip) Longer addresses will wrap to two lines.
- The Location Map is auto-populated from Location Manager.

## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

### A. Variable Types & Functionality:

The following are programmed variable options that apply a function to each text frame.

#### Single Line Text Field:

Offer Text

#### Multiple Line Text Field:

Offer Text

#### Formatted Text:

Offer Bullets Points

- A Free 12 oz Beer on Your Birthday
- 10% Off Apparel and Merchandise
- Exclusive Beer Club Member Events
- A Free Beer Club Growler - fill up anytime for \$10
- Advanced email notice of new beers being

12

normal

[Black]

Text frames within templates can behave in a variety of ways. The following are common configurative options for text frames:

- Resize text frame based on amount of text entered (see “Text Frame Sizing” below)
- Resize text based on amount of text entered (see “Copy Fitting” below)
- Alignment of text
- Columns
- Wrap
- Character spacing
- Style
- Text on a path

**Text Frame Sizing** - As a user enters more copy, text frames can increase or decrease in size while keeping the original text size preserved.

Depending on the type of template, there may be a desire to control how the text frame is positioned as it resizes.

#### The following options can be applied to text frames:

- Grow in one direction (ex: down)
- Grow in multiple directions (ex: down and right)
- Limited (ex: limited to 1” down to avoid running into other elements on the template)
- Anchored to other objects impacting their positioning

#### Formatting and character limits -

Some forced formatting can be applied to customizable text to control user entry and enforce brand standards.

#### The following are common supported formatting function:

- Phone numbers (XXX-XXX-XXXX or XXX.XXX.XXXX)
- Customized auto prefix or suffix (If the fax field is completed, then the prefix of FAX appears on the template; if it is left blank, then FAX does not appear on the template.)
- Text limits (Using two characters for a “state” field)
- Force all characters to uppercase or lowercase



## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

**Copy Fitting -** A way to adjust font sizing based on the amount of text added within a text frame. When copy fitting is used, the size of the text frame remains the same.

**Copy fitting can accomplish the following:**

- Incrementally decrease font size (as more text is added within a defined text frame)
- Incrementally increase font size (as text is removed - generally, this is less desirable)

Depending on the template, there may be a need to control the flexibility of copy fitting.

**The following options can be applied to copy fitting:**

- Define a maximum number of lines (ex: setting a maximum of 3 lines, limiting the amount of content or enforcing a font-size reduction)
- Set a minimum font-size reduction (ex: if standard font was 12 pt and you did not want to allow shrinking below 6 pt, a 50% reduction limit can be applied)
- Set a minimum font-size enlargement (ex: if standard font was 12 pt and you did not want to allow it above 24 pt, a 200% enlargement limit can be applied)

**Number:**

Item 1 Price

**Barcode/QR Code:**

Url



**Color:**

Offer Text Color

This is a document color. It may be applied to other objects!

C	<input type="range"/>	<input type="text" value="48"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>
M	<input type="range"/>	<input type="text" value="75"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>
Y	<input type="range"/>	<input type="text" value="79"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>
K	<input type="range"/>	<input type="text" value="70"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>



**Button Bar:**

**Checkbox:**

Show Digital Ads



## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

Date:

Rewards Night

No date selected.. 

< APRIL > 2023 >

SU	MO	TU	WE	TH	FR	SA
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Date Display -

A force-formatting function can be applied to control the style format (ex. Month Day, Year or XX/XX/XXXX)

Image:

Banner Image



We're Waiting For You.pdf 



Click the camera to choose alternate banners.

SELECT IMAGE 



Image	Name
	2 For 1 Deals.pdf
	Happy Hour Special.pdf
	We're Waiting For You.pdf
	Where Good Time Happen.pc

Image Frame Options -

Images used as part of a customizable field can have one of the following placement functionality applied to the frame.

**Stretch** - Image will fit-to-frame with no constraints on proportion. This can result in distorted images. Therefore, it is not recommended.



**Proportional Fit** - Image will enlarge/reduce until either width or height fills the frame. Note in this case, however, one dimension will fall short unless the image's aspect ratio is the same as the frame.



## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

**Manual** - Image scale, size, position and rotation all are set manually in Media Builder. You may opt to have image settings visible to the end user or hidden.



**Proportional, Outside** - Image will enlarge/reduce to fit the lesser of width or height. This is similar to proportional fit, but some image clipping will occur as one dimension will extend beyond the frame when the other dimension fits within the frame.



### Image size & format -

For images used as part of a customizable field in your document, it is preferred they are placed at 100% scale. Oversized images will slow the end-user experience for template load.

#### The following are other considerations to make:

- Acceptable Vector Image File Formats (.eps, ai, pdf & .svg)
- Acceptable Raster Image File Formats (.pdf, .psd, .tiff, .tif, .jpg, jpeg, .png or .eps)
- Please remove all Photoshop alpha channels.
- Mix of tall and wide images placed into a wide frame will result in image clipping or unwanted white space (*ensure the aspect ratio is similar for all images, See Image Frame Options Above*)

### Calculated Field:

Quantity	<input type="text" value="10"/>	<input type="button" value="^"/>	<input type="button" value="v"/>
Quantity	<input type="text" value="10"/>	<input type="button" value="^"/>	<input type="button" value="v"/>
Total	20		

### List:

Offer Options	<input type="text" value="Join Our Beer Club"/>	<input type="button" value="v"/>
	Join Our Beer Club	
	Happy Hour Specials	
	Customized Offer	



## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

### B. Settings:

The following settings can be used to help determine the user experience desired for each variable.

SETTINGS	VARIABLE TYPES										
	Single Line	Mult. Lines	Formatted	Calculated	Image	Number	Checkbox	Date	List	Button	Barcode/QR Code
Required Content	•	•		•				•	•		•
Non-Required Content	•	•	•	•	•	•	•	•	•		•
Auto-populated by Data Source	•	•		•	•	•	•	•			•
Non-editable	•	•		•	•	•		•	•		•
Free-edit	•	•	•			•		•			•
Default Value	•	•	•	•	•	•	•	•	•		•
No-default Value	•	•	•	•	•	•	•	•	•		•
Multiple Selection									•		
Single Selection							•		•	•	
Upload Only					•						
Upload & Selection (Re-use)					•						
Upload & Selection Open Directory					•						
Mathematical Calculations				•		•					
Styles & Content Change			•				•		•	•	
Date Selection w/ X day in Past/Future								•			
Element Visibility							•		•	•	
Static Code Value											•
Custom Code Value											•



## STEP 5: DEFINING CUSTOMIZATION: CONTINUED

### C. Database

If your templates are expected to auto-populate with database values, refer to the following options to determine how the data pumps through. The following are common data source options to utilize.

- CSV Datasource Embedded
- Import from User Profile
- Custom CSV Datasource Upload
- Import from Location Manager

#### User Profile Account Information:

##### My Account:

- Prefix
- Middle Name
- Suffix
- Title
- Phone Number Extension
- Fax Number
- Company Name
- Twitter Handle
- Pinterest Url
- First Name
- Last Name
- Email
- Phone Number
- Cell Phone Number
- Division
- LinkedIn Url
- Facebook Url
- Website Url

#### Default Shipping Address:

- Street Address 1
- City
- State
- Street Address 2
- Country
- Zip

#### Location Manager Product Localization:

##### Commonly used location manager fields:

- Location Name
- Suite/Unit Address
- State
- Location Url
- Street Address
- City
- Zip
- Location Phone Number

Location Manager is not limited to what is shown: it can be customized to contain any fields of content that will be used across templates and to manage the content in a central source.

*Note: Unless otherwise noted, text-based template variables pulling information from location manager are set as required and uneditable in the template. Common exceptions: business cards variables, second line of street address (may not be required).*



## STEP 6: PACKAGING FILE FOR HAND-OFF

Once you are ready to supply your files, include all images and fonts. Ensure all images used are linked in the file and there are no missing fonts.

Creating a Package of the InDesign or Illustrator file will ensure you are supplying all used graphics and fonts. If you are unsure how to create an InDesign or Illustrator Package, you can find instructions within Adobe's help online. If supplying your page(s) in another file format be sure to supply all used images and fonts in appropriately labeled folders. Add any additional assets needed for customizable options within the template following the guidelines provided in the **Image Size & Format** section under **Step 5: Defining Customization**.

**The following are common best practices to properly supply native files:**

- Clearly label all folders within package (ex. Assets, Fonts)
- Supply all images at 100% scale
- Supply all images expected to print with transparent background as a rastered .png or vector .eps file format with the background already removed.
- Clearly label the annotated pdf (ex. name\_size\_markup.pdf)
- Sample of data, if the template should have a .csv function
- Sample of all possible layout versions, if template has non-required variable content (ex. business cards)
- Remove all unused swatches from the file
- Set up all swatches of linked vector artwork to match the way the document is expected to print. (ex. artwork without spots if printing cmyk)

Zip the InDesign Package folder and upload to our ftp. Your CXA & Sales Rep will be notified when files are uploaded to the ftp.

